United States Government   **Department of Energy**

Memorandum

DATE: **January 7, 2021**   **WAP Memorandum 074**

REPLY TO
ATTN OF: **Erica Burrin, Weatherization Assistance Program, Program Manager**
          Weatherization and Intergovernmental Program Office

SUBJECT: **Weatherization Assistant Suite of Tools Update**

  TO: **Weatherization Assistance Program Grantees**

INTENDED
AUDIENCE: **Grantee Program Managers, Grantee Technical Managers, Subgrantee Program Directors,**
           Subgrantee Technical Managers, Weatherization Training Centers

Background:

The Weatherization Assistant (WA) Suite, consisting of four audit tools specifically developed by the Oak Ridge National Laboratory (ORNL) to assist in implementation of the US Department of Energy (DOE) Weatherization Assistance Program (WAP). These tools are available for use within the WAP and may also be adopted by utilities and other home energy professionals.

WA Software Suite consists of:

- National Energy Audit Tool (NEAT) for site-built, single-family homes.
- Manufactured Home Energy Audit (MHEA) for manufactured homes.
- Multifamily Tool for Energy Audits (MulTEA) for multifamily buildings.
- Health and Safety Audit for single-family homes (including manufactured homes) and individual dwelling units in multifamily buildings that are being weatherized.

The three energy audit tools identify the cost-effective energy-efficiency retrofit measures considering site specific weather conditions, local retrofit measure costs, area fuel costs, and its specific construction details. The Health and Safety Audit assists in the identification and selection of health and safety measures when a dwelling is undergoing an energy-efficiency retrofit (i.e., Weatherization).

At the time of this memo, there are two existing versions of the WA tools. NEAT and MHEA which are combined in a single computer application that works on a local network only, and a web-based application that provides access to MulTEA and the Health and Safety Audit. ORNL is nearing completion of the task to migrate NEAT, MHEA, and other features included in the computer application (e.g., work orders) to the web-based application so that all four audits and other features can be accessed from one source.

Update:

To comply with the requirement outlined in [Weatherization Program Notice (WPN) 19-4 (Section 2)](), once the updated version of the NEAT and MHEA audit tool (version 10) is migrated to the web and approved for use by DOE, Grantees of the WAP are required to transition to this new version within 60 days of DOE approval of the updated version. To facilitate a smooth transition, DOE has chosen to extend that transition period until each Grantee's Program Year (PY) 2022 start date (April 1st or July 1st of 2022).

All WAP Grantees with a current DOE approval for the use of the native computer versions of NEAT and MHEA (v8) must transition fully to the online version (v10) of these tools no later than the beginning of their respective PY 2022. Grantees may begin to transition as early as June 1st, 2021 but must complete the transition no later than the beginning of their respective PY 2022 start date.

Transition Process:

- PY 2021 Annual Plan Submittals: All WAP Grantees who use the computer versions of NEAT or MHEA must include a description of the process for their program's transition to the web-based version in their PY 2021 Annual Plan Submittals. These details must be contained in [Sections V.5.2 & V.8.4]() (Energy Audit Procedures & Training and Technical Assistance) and address the following:
    - Transition timeline with clear goals and target dates
    - Planned training and technical assistance for Grantee and Subgrantee staff with timelines and target dates
        - See projected training schedule below.
- Energy Audit Approval Submittals: Grantees are not required to submit any additional audit documentation to DOE regarding their transition to v10 unless the transition results in changes to the audit procedures previously approved by DOE in writing (e.g., adding new non-appendix A materials, updating itemized cost procedures, etc.).
- DOE Audit Access: To comply with [WPN 19-4 (Section 1 – *Ongoing* Monitoring)]() all Grantees must provide DOE with read-only administrative access to their energy audit tool for the duration of the grant.

Implementation Timeline:

Grantee Task	Due Date
Approved Annual Plan including transition details to web-based audit tools within Energy Audit Procedures & Training and Technical Assistance (T&TA) section	Beginning of Grantee PY 2021 (April 1st or July 1st)
Grantees may begin transition to v10	June 1st, 2021 (Or earlier with DOE approval)
Grantees must be fully transitioned to v10	Beginning of Grantee PY 2022 (April 1st or July 1st)

Training Opportunities:

To assist Grantees and Subgrantees through successful transition to the web-based versions of NEAT and MHEA (WA v10), DOE has commissioned ORNL to provide materials for training development and support to Grantees and Training Providers in the 2021 calendar year. A basic timeline of support and development activities is shown below. The timeline provides for two key milestones for WAP Grantees and Training Providers. Release of a foundation curriculum focused on Grantees that wish to convert to WA v10 in 2021 (shown as "conversion curriculum" on the table) occurs first. Following feedback from subject matter experts, ORNL will release curriculum components and guidance spanning new WA v10 users through experienced/advanced users (shown as "core curriculum"). Additional details regarding these items will be made available to the WAP network as more information becomes available.

ORNL Task	Intended Outcome	Due Date
Conversion Curriculum Release	Deliver immediately implementable curriculum materials for users converting from WA v8	March 2021
Identify and engage Training Providers (Grantees, Training Centers and other WAP training organizations) to solicit input on materials to be developed for Core Curriculum	List of key items to be developed for Core Curriculum	April 2021
Preview training curriculum plan and materials for training development package at WAP Training Providers' Summit	Feedback from Grantees and Training Providers on training curriculum plan and materials for training development package	July 2021
Core Curriculum Release	WAP network-wide release of curriculum materials for all WA v10 users	September 2021
Host up to (3) train-the-trainer events for Grantees and Training Providers	Grantees and Training Providers (event attendees) equipped in development and delivery of training on WA v10	November 2021

Conclusion:

DOE's commitment to continuous improvement has driven the implementation of this update to the WA suite of tools utilized by the WAP network. Throughout this process DOE will keep the WAP network informed of additional updates, resources, and training opportunities as they become available.

If you have questions or concerns about implementation, please contact your DOE Project Officer, or Derek Schroeder (derek.schroeder@ee.doe.gov)